



# 2019 Personal Income Tax

Information Package

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*See The Future Today – Plan For Tomorrow*

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**DTA**

**ACCOUNTANTS • BUSINESS ADVISORS**

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# 2019 Personal Income Tax Checklist

2020 - A new decade begins and a new beginning for us at DTA Accountant & Business Advisors. We've worked hard in the background to improve our office operations to bring to you our clients an improved premium level of service. Everything has been streamlined in our office with the sole intent of providing our clients a new level of service, efficiency, convenience and satisfaction. We look forward to your visit in our newly renovated Gravenhurst office. We are also looking forward to meeting you in our new office location at 111 Manitoba Street, Bracebridge Ontario. Also, visit our new website at [www.dtaa.ca](http://www.dtaa.ca) to keep updated with all CRA changes.


DTA wants to make it easy for you. Included in our package is the 2019 Personal Income Tax Checklist to assist with the information collection process so that we can prepare your returns as quickly and efficiently as possible. Once you have all your information gathered, it can be dropped off at either of our locations in Gravenhurst or Bracebridge (it's always nice to see you) or if you have a scanner, you can scan everything and email it to [personaltax@dtaa.ca](mailto:personaltax@dtaa.ca). Once we receive your information, we'll quickly send you a confirmation so you know we have it.

Below we've provided a few "**Tips to Help**" with the preparation process:

1. **Benefits of Filing Early** – Aside from receiving your tax refund earlier, you will more likely maximize your income tax opportunities (RRSP Contribution, etc....) and we'll have more time to access your bookkeeper (if we don't already look after your bookkeeping) or investment advisor for yearly totals and investment summaries. Submitting early returns also shows goodwill with CRA.
2. **Professional Consultations** – A scheduled consultation with us is an excellent way to maximize your opportunities, particularly if it is done before the end of February. If you have significant non-registered financial investments or rental properties, operate a business or just want to have an overall review of your financial health, make an appointment to see us. We're always available.
3. **Package your Information** – It's simple and effective. If you plan on bringing in your tax information in person, use the checklist provided and save time by bringing in everything in an envelope and one time only. Of course, if some of your information arrives late let us know ASAP so that we can make changes or adjustments in a timely manner before your tax returns are e-filed to CRA.
4. **Internal Deadline** – We have an internal deadline of April 15<sup>th</sup>. What does this mean? It's simply because we prepare hundreds of individual returns within a short period of time each year, if your information is received after April 15<sup>th</sup>, we cannot guarantee that your income tax returns will be finalized by the filing deadline of April 30<sup>th</sup>. We will of course strive to meet the filing deadline if you bring in your information after April 15<sup>th</sup> but **HELP US EXCEED YOUR EXPECTATIONS.**

# 2019 Personal Income Tax Checklist

Every question is a good question. Big or small, we encourage you to call us and get your answer(s).

PERSONAL INFORMATION (if we prepared your 2018 return, please complete only if there is a change)					
Name	SIN #	Date of Birth (YYYY/MM/DD)	H. Phone	W. Phone	Cell Phone
Address:				Postal Code:	
Email:		Marital Status:		Date of status change:	
Are you a Canadian resident: Y / N		Are you a US resident: Y / N		COMPLETE T1135: Y / N	
DEPENDENTS:					
Name:		DOB:		Relationship:	
Name:		DOB:		Relationship:	
Name:		DOB:		Relationship:	
Name:		DOB:		Relationship:	
Did you receive UCCB (RC62): Y / N		First Time Home Buyer or LLP Payback: Y / N		Last year NOA (2018)	
Income and Expense details: Please ensure all slips are accounted for to avoid any penalties and interest imposed by CRA.					
INCOME			DEDUCTIONS/CREDITS		
T3	Support payments		Volunteer firefighter		
T4	Home Buyers/LLP		Tax preparation fees		
T4A	Foreign Income		Northern Ontario Resident		
T4A (P)	US Social Security		Adoption expense		
T4A (OAS)	Stocks & Bonds		Childcare expenses		
T4RSP	Buy & Sell real estate		Caregiver claim		
T4E	Rental income & expense		Capital loss		
T4RIF	Self-employed inc & expense		Disability claim T2201		
T4PS	Commission inc & expense		Donations – Charitable & Political		
T5	Farming inc & expense		Employment expenses T2200		
RC62	Fishing inc & expense		First Time Home Buyer		
T5007	Other Income:		Interest on investment		
T5008	1.		Legal fees		
T5013	2.		Medical expenses		
T5018	3.		Moving expenses		
			Pension amount		
			RRSP contributions		
			Student loan interest		
			Tuition fee(s)		
			Transit passes		
			Union Dues		
<p>2-390 Muskoka Rd. North, Gravenhurst, ON P1P 1T7 (705) 687-7737 <a href="http://www.dtaa.ca">www.dtaa.ca</a></p>			TAX INSTALMENT(S) PAID		
			<p>Did you sell your home during 2019 or/and have property/investments outside of Canada worth more than \$100,000? It is a requirement by CRA that this be reported on your returns. Please advise us if this applies.</p>		

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## ADDITIONAL ITEMS TO CONSIDER

1. Are you or your dependent(s) disabled? If so, provide Form T2201 - Disability Tax Credit Certificate. The transfer rules allow claims for certain dependent relatives. Persons with disabilities may also receive tax relief for the cost of disability supports (e.g. sign language services, talking textbooks, etc.) incurred for the purpose of employment or education.
2. Are you the caregiver for any infirm family members?
3. Did you provide in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependent relative? A federal tax credit may be available. Certain provincial credits may also be available. Also, the caregiver may claim related training costs as a medical expense credit.
4. Do you want your tax refund deposited directly into your account at a financial institution?
5. If you have children up to the age of 17, have you received the Universal Child Care Benefit (UCCB)? If not, please provide details and we may be able to assist in obtaining some past benefits. Note that the UCCB ceased in mid-2016. For some taxpayers, this benefit was replaced by the Canada Child Benefit (CCB). The CCB is an income tested benefit and therefore may not be provided to certain higher income individuals who previously received the UCCB.
6. Employment expenses incurred as part of your work? Don't forget to have the T2200 Employment Expense form filled out and signed by your employer. No expenses can be claimed without this form.
7. Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the United States? You may have U.S. filing obligation(s). DTA can assist you in your U.S. tax return filing needs.
8. Have you spent more than 200 hours acting as a volunteer fire fighter or a search and rescue volunteer? You may be eligible for a federal tax credit.
9. Do you authorize CRA to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?
10. Did you receive a retroactive lump-sum payment over \$3,000 (for example, spousal support)? In certain cases, some tax relief may be granted.
11. GST/HST information, such as for the new residential/rental property rebate.
12. Other provincial and territorial tax credits may be available in your jurisdiction such as certain property taxes and residential rent paid in Ontario.
13. Did you purchase a new home in 2019? If so, you may be eligible for the new residential property GST/HST rebate